

# Trade and Market Bulletin Greater Darfur Region

## Darfur Development and Reconstruction Agency



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### Introduction

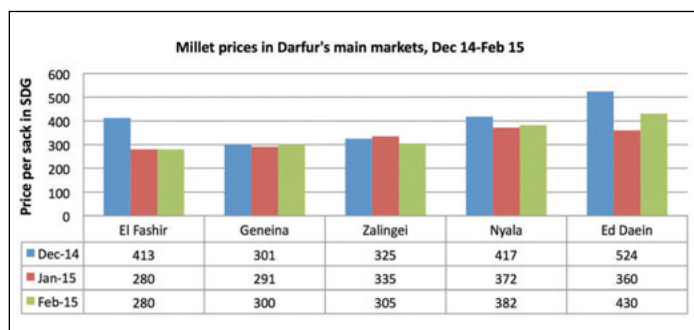
Since 2010 the Darfur Development and Reconstruction Agency (DDRA) has been operating a market monitoring and trade analysis (MMTA) project in Darfur. The project was first piloted in North Darfur in 2010. Expansion into West Darfur followed in 2012, Central Darfur in 2013 and finally South and East Darfur in 2014. Forty-six national CBOs/NGOs now monitor 73 markets across Darfur, providing unique market coverage. 15 markets are monitored by 8 CBO/NGOs in North Darfur; 12 markets by 6 CBOs/NGOs in West Darfur; 10 markets by 5 CBOs/NGOs in Central Darfur; 22 markets by 16 CBOs/NGOs in South Darfur; and 14 markets by 11 CBOs/NGOs in East Darfur.



### Cereals

December to February is typically cereal harvest season in Darfur. Cereal production was relatively better this quarter compared to the last harvest season (2013-2014) across all five of Darfur's states due to good levels of rainfall<sup>1</sup>. As a consequence cereal price rises slowed or stabilised in most of the monitored markets across Darfur. However, in markets affected by insecurity (e.g. Nertiti in Central Darfur and Tabit in North Darfur) cereal prices, particularly millet, were slightly more volatile. In both South and East Darfur cereal prices varied from

<sup>1</sup>Post-harvest reports from the relevant Ministries of Agriculture.



*Figure 1: Millet prices in Darfur's main markets, December 2014 to February 2015*

one market to another according to local conditions. Both South and East Darfur are regarded as important cash crop areas, which may explain why cereal prices were higher in Nyala and Ed Daein than in El Fashir. Cereal prices were also affected by pastoralists' movements between states. See Figure 1.

### Background and methodology

The goal of this community-based market monitoring project is to deepen analysis and understanding of the shifting patterns of trade and markets in Darfur, on an ongoing basis for key agricultural and livestock commodities, to identify how livelihoods and the economy can be supported through trade, and to identify peace-building opportunities through trade. Through a network of 46 national CBOs/NGOs, DDRA is monitoring 73 markets across all five Darfur states. Quantitative data, for example the price of Darfur's main cereals, livestock, cash crops and fruits and vegetables are collected weekly as well as qualitative data, for example on sources of supply. Some data are collected on a monthly basis, for example transport costs, transport routes and the impact of the conflict on flows of commodities. DDRA holds quarterly analysis workshops with the CBO enumerators in each state, and the findings are written up as quarterly 'Headline' documents for each state. This trade and market bulletin for the Greater Darfur Region is written and disseminated after the headline documents. It summarises the analysis at state-level and comments on inter-state trade.

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## Livestock

Generally livestock prices stabilised this quarter reflecting stable market conditions across Darfur. However, there were some exceptions. Insecurity in North Darfur impacted livestock prices, pushing them down in many monitored markets: the price of looted animals and distress sales are usually lower than normal market prices. Livestock prices in South and East Darfur were impacted by the seasonal movement of livestock. The price of sheep was particularly high in Nyala because it is the largest population concentration in Darfur and therefore sees the highest levels of demand. See Figures 2 and 3.

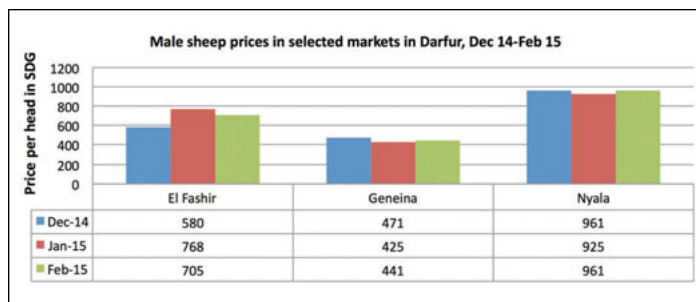


Figure 2: Male sheep prices in selected markets in Darfur, December 2014 to February 2015

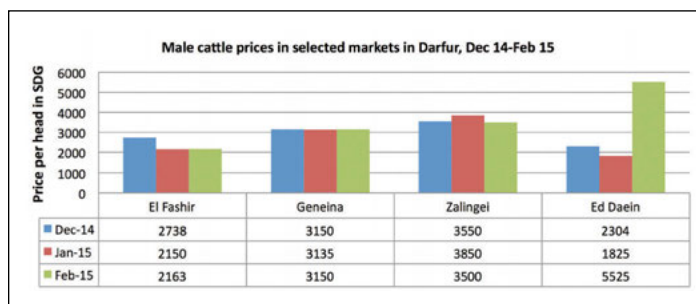


Figure 3: Male cattle prices in selected markets in Darfur, December 2014 to February 2015.

## Cash Crops

In general cash crop prices showed an upward trend this quarter as the harvest season phased out. Groundnut prices in particular increased steadily in almost all monitored markets in Darfur. See Figure 4. Despite the good rainfall groundnut production was poor because heavy rainfall early in the rainy season followed by much drier conditions led to early plant growth but with fewer nuts to harvest. The localised conflict between the Rezaigat and the Ma'aliyya in East Darfur also had a negative impact on groundnut production last season. Increasing groundnut prices were partly due to the growing demand for groundnut cooking oil: traders are now officially permitted to mix imported cooking oil with local groundnut oil, increasing demand for the latter. There was also increased demand for groundnut cake for animal fodder, which is exported to the Gulf.

The heavy rainfall this quarter had a positive effect on availability of dried okra and dried tomatoes this quarter. As a consequence prices of both fell in most monitored markets compared with the same quarter last year. Some important cash crops were not available at all in the monitored markets: gum Arabic is cultivated in remote areas and is more affected by insecurity than other crops; hibiscus prices have been low for quite some time and it is no longer an attractive option for farmers; watermelon seeds are not widely cultivated in Darfur.

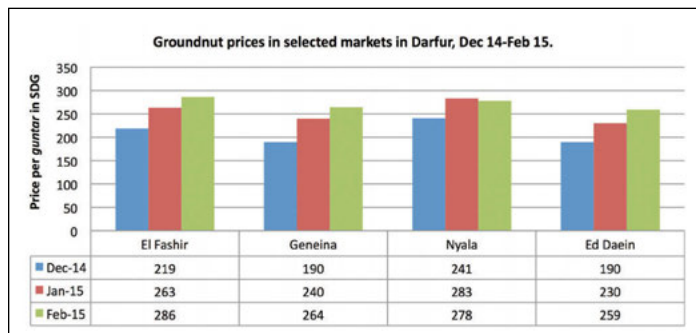


Figure 4: Groundnut prices in selected markets in Darfur, December 2014 to February 2015

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## Fruits and Vegetables

Seasonality affected the market availability of fruit and vegetables this quarter. Onion prices decreased steadily in most monitored markets across Darfur as the harvest season started. The completion of the El Ingaz trade route up to El Fashir also led to a decrease in onion prices (see the Trade Routes section

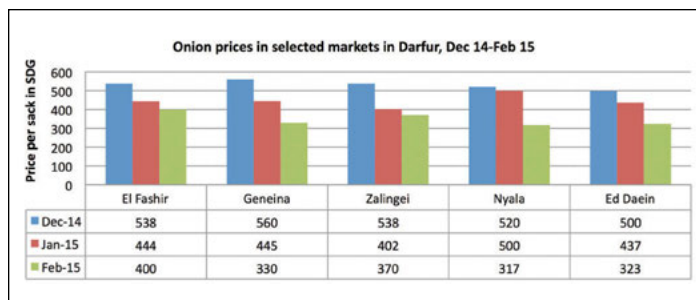


Figure 5: Onion prices in selected markets in Darfur, December 2014 to February 2015

for more information). In both South and East Darfur onion prices varied from one market to another because neither state cultivates onions; they import onions from Central and North Darfur and Central Sudan. See Figure 5. Fresh tomato prices started to decrease gradually as the harvest season phased out.

## Trade Routes

The most important trade routes in Darfur remained fairly calm and functioning well this quarter. The exception was the route that connects Omdurman with Ed Daein via Adilla which was disrupted by localised conflict in East Darfur. The paved El Ingaz trade route contributed to reducing the commodity price gap between markets in Darfur and Central Sudan. For example the price of cement in El Fashir before the El Ingaz route was completed was 130 SDG per bag. Now it is 85-90 SDG per bag compared to 60 SDG in Khartoum.

In North Darfur the Kebkabiya-El Fashir trade route through Korma reopened this quarter and the number of check points



reduced. Additionally a new trade route opened (Nyala-Kas-Kator -Zalingei instead of the Nyala-Kas-Nertiti-Zalingei) because of insecurity in the Jebel Marra area. This had an impact on costs and trade to El Geneina as well as to Zalingei.

## Daily Labouring

During this quarter winter agricultural activities, brick-making, house services and shepherding in South and East Darfur states were the main sources of daily labouring income generation for the majority of people in Darfur. The daily labouring rate for an

individual was around 20 to 25 SDG per day either in agricultural activities, brick-making or shepherding, but the rate for domestic work was less, around 15 to 20 SDG per person per day (women often engage in domestic work). There was little variation between states.



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**DDRA has a technical agreement with a number of ministries in each Darfur state: North, West, Central, South and East**



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